

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

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Open to Public Inspection

For calendar year 2020, or tax year beginning 01-01-2020, and ending 12-31-2020

Name of foundation: RUTH & PETER METZ FAMILY FOUNDATION co THOMAS PHELAN. A Employer identification number: 52-1591150. B Telephone number: (908) 232-2244. C If exemption application is pending, check here. D 1. Foreign organizations, check here. E If private foundation status was terminated under section 507(b)(1)(A), check here. F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here. I Fair market value of all assets at end of year: \$12,025,631. J Accounting method: Cash.

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)

Table with 4 columns: (a) Revenue and expenses per books, (b) Net investment income, (c) Adjusted net income, (d) Disbursements for charitable purposes. Rows include: 1 Contributions, gifts, grants, etc.; 2 Check if not required to attach Sch. B; 3 Interest on savings; 4 Dividends and interest from securities; 5a Gross rents; 5b Net rental income; 6a Net gain or loss from sale of assets; 6b Gross sales price; 7 Capital gain net income; 8 Net short-term capital gain; 9 Income modifications; 10a Gross sales less returns and allowances; 10b Less: Cost of goods sold; 10c Gross profit or loss; 11 Other income; 12 Total; 13 Compensation of officers; 14 Other employee salaries; 15 Pension plans; 16a Legal fees; 16b Accounting fees; 16c Other professional fees; 17 Interest; 18 Taxes; 19 Depreciation; 20 Occupancy; 21 Travel; 22 Printing; 23 Other expenses; 24 Total operating and administrative expenses; 25 Contributions paid; 26 Total expenses and disbursements; 27 Subtract line 26 from line 12; a Excess of revenue over expenses; b Net investment income; c Adjusted net income.

Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash—non-interest-bearing			
	2 Savings and temporary cash investments	300,108	269,660	269,660
	3 Accounts receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	4 Pledges receivable ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶ _____ Less: allowance for doubtful accounts ▶ _____			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments—U.S. and state government obligations (attach schedule)			
	b Investments—corporate stock (attach schedule)	8,476,228	8,641,993	11,750,567
	c Investments—corporate bonds (attach schedule)			
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)			
	14 Land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
15 Other assets (describe ▶ _____)	141,659	5,404	5,404	
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	8,917,995	8,917,057	12,025,631	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue.			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)			
	23 Total liabilities (add lines 17 through 22)		0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ <input type="checkbox"/> and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ <input checked="" type="checkbox"/> and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	8,917,995	8,917,057	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds			
29 Total net assets or fund balances (see instructions)	8,917,995	8,917,057		
30 Total liabilities and net assets/fund balances (see instructions)	8,917,995	8,917,057		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year—Part II, column (a), line 29 (must agree with end-of-year figure reported on prior year's return)	1	8,917,995
2 Enter amount from Part I, line 27a	2	-938
3 Other increases not included in line 2 (itemize) ▶ _____	3	
4 Add lines 1, 2, and 3	4	8,917,057
5 Decreases not included in line 2 (itemize) ▶ _____	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29.	6	8,917,057

Part IV Capital Gains and Losses for Tax on Investment Income

Table with 4 columns: (a) List and describe the kind(s) of property sold, (b) How acquired, (c) Date acquired, (d) Date sold. Rows include ML a/c#825-04M68 and BofA a/c#82574538.

Table with 4 columns: (e) Gross sales price, (f) Depreciation allowed, (g) Cost or other basis plus expense of sale, (h) Gain or (loss). Rows a-e show calculations for each asset.

Table with 4 columns: (i) F.M.V. as of 12/31/69, (j) Adjusted basis as of 12/31/69, (k) Excess of col. (i) over col. (j), (l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h)).

Summary rows for Capital gain net income or (net capital loss) and Net short-term capital gain or (loss) as defined in sections 1222(5) and (6).

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE

Table with 4 columns: (a) Reserved, (b) Reserved, (c) Reserved, (d) Reserved. Rows 2-8 are reserved for future use.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here [] and enter "N/A" on line 1.
Date of ruling or determination letter: (attach copy of letter if necessary—see instructions)
b Reserved 1 7,329
c All other domestic foundations enter 1.39% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 2
3 Add lines 1 and 2. 3 7,329
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 4
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 5 7,329
6 Credits/Payments:
a 2020 estimated tax payments and 2019 overpayment credited to 2020 6a 8,512
b Exempt foreign organizations—tax withheld at source 6b
c Tax paid with application for extension of time to file (Form 8868) 6c
d Backup withholding erroneously withheld 6d
7 Total credits and payments. Add lines 6a through 6d 7 8,512
8 Enter any penalty for underpayment of estimated tax. Check here [] if Form 2220 is attached. 8
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid. 10 1,183
11 Enter the amount of line 10 to be: Credited to 2021 estimated tax Refunded 11 1,183

Part VII-A Statements Regarding Activities

1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? Yes No
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). Yes No
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.
1c Did the foundation file Form 1120-POL for this year? Yes No
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. \$ (2) On foundation managers. \$
3 Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? Yes No
If "Yes," attach a detailed description of the activities.
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes Yes No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? Yes No
4b If "Yes," has it filed a tax return on Form 990-T for this year? Yes No
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? Yes No
If "Yes," attach the statement required by General Instruction T.
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:
• By language in the governing instrument, or
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV. Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions)
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2020 or the taxable year beginning in 2020? See the instructions for Part XIV. If "Yes," complete Part XIV Yes No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses. Yes No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? Yes No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? Yes No

(3) Provide a grant to an individual for travel, study, or other similar purposes? Yes No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions. Yes No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? Yes No

b If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions **5b**

Organizations relying on a current notice regarding disaster assistance check here.

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? Yes No

If "Yes," attach the statement required by Regulations section 53.4945–5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? Yes No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? Yes No

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? Yes No

b If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction? Yes No

8 Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year? Yes No

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
W PETER METZ III 29 HAMPTON ROAD CRANFORD, NJ 07016	CO-PRES 1.00	0		
MICHAEL M METZ 29HAMPTON ROAD CRANFORD, NJ 07016	CO-PRES/TREAS 3.00	1,250		
SARAH METZ KRISOFF 29 HAMPTON ROAD CRANFORD, NJ 07016	VP 1.00	0		
DENISE SHEKERJIAN 29 HAMPTON ROAD CRANFORD, NJ 07016	VP 1.00	0		
THOMAS C PHELAN 29 HAMPTON ROAD CRANFORD, NJ 07016	SEC'Y 1.00	4,000		
DAVID METZ 29 HAMPTON ROAD CRANFORD, NJ 07016	ASS'T TREAS 1.00	0		
AUSTIN KRISOFF 29 HAMPTON ROAD CRANFORD, NJ 07016	Trustee 1.00	0		
LUKE METZ 29 HAMPTON ROAD CRANFORD, NJ 07016	Trustee 1.00	0		
MATTHEW METZ 29 HAMPTON ROAD CRANFORD, NJ 07016	Trustee 1.00	0		
JULIETTE WALLACK 29 HAMPTON DRIVE CRANFORD, NJ 07016	Trustee 0.00	0		

2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
MERRILL LYNCH 100 CAMPUS DRIVE FLORHAM PARK, NJ 07932	INVESTMENT ADVISORY	109,369

Total number of others receiving over \$50,000 for professional services. **▶**

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 None	0
2 _____ _____	
3 _____ _____	
4 _____ _____	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 _____ _____	
2 _____ _____	
3 All other program-related investments. See instructions. _____	

Total. Add lines 1 through 3 **▶**

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities.	1a	10,218,228
b	Average of monthly cash balances.	1b	672,816
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	10,891,044
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d.	3	10,891,044
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	163,366
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	10,727,678
6	Minimum investment return. Enter 5% of line 5.	6	536,384

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	536,384
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	7,329
b	Income tax for 2020. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b.	2c	7,329
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	529,055
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	529,055
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	529,055

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	522,625
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	522,625
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	522,625

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				529,055
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2020:				
a From 2015.			38,669	
b From 2016.			21,273	
c From 2017.			45,160	
d From 2018.				
e From 2019.			44,527	
f Total of lines 3a through e.	149,629			
4 Qualifying distributions for 2020 from Part XII, line 4: ▶ \$ <u>522,625</u>				
a Applied to 2019, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2020 distributable amount				522,625
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)	6,430			6,430
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	143,199			
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see instructions				
e Undistributed income for 2019. Subtract line 4a from line 2a. Taxable amount—see instructions				
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)				
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions)	32,239			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a	110,960			
10 Analysis of line 9:				
a Excess from 2016	21,273			
b Excess from 2017	45,160			
c Excess from 2018.				
d Excess from 2019	44,527			
e Excess from 2020				

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> CHARLOTTE LIBRARY PO BOX 344 CHARLOTTE,VT 05445	NONE	501(c)	PROVIDE OPERATING FUNDS	1,000
BURLINGTON CITY ARTS FOUNDATION 135 CHURCH STREET BURLINGTON,VT 05401	NONE	501(c)	PROVIDE OPERATING FUNDS	27,000
UNITED WAY OF NORTHWEST VERMONT 412 FARRELL STREET - STE 200 SOUTH BURLINGTON,VT 05403	NONE	501(c)	PROVIDE OPERATING FUNDS	13,000
COMMITTEE ON TEMPORARY SHELTER PO BOX 1616 BURLINGTON,VT 05402	NONE	501(c)	PROVIDE OPERATING FUNDS	3,000
CHAMPLAIN COLLEGE 163 SOUTH WILLARD ST BURLINGTON,VT 05402	NONE	501(c)	PROVIDE OPERATING FUNDS	5,000
SEABA 28 HOWARD STREET BURLINGTON,VT 05401	NONE	501(c)	PROVIDE OPERATING FUNDS	5,000
GREATER WORCESTER COMMUNITY FOUNDAT 370 MAIN STREET SUITE 650 WORCESTER,MA 01608	NONE	501(c)	PROVIDE OPERATING FUNDS	209,000
SHELBURNE MUSEUM PO BOX 10 SHELBURNE,VT 05482	NONE	501(c)	PROVIDE OPERATING FUNDS	3,000
FLYNN CTR FOR PERFORM ARTS 153 MAIN STREET BURLINGTON,VT 05401	NONE	501(c)	PROVIDE OPERATING FUNDS	1,000
HUNGER FREE VERMONT 38 EASTWOOD DRIVE - STE 100 SOUTH BURLINGTON,VT 05403	NONE	501(c)	PROVIDE OPERATING FUNDS	5,000
HUMANE SOCIETY OF CHITTENDEN COUNTY 142 KINDNESS COURT SOUTH BURLINGTON,VT 05403	NONE	501(c)	PROVIDE OPERATING FUNDS	3,000
STERN CENTER 183 TALCOTT ROAD WILLISTON,VT 05495	NONE	501(c)	PROVIDE OPERATING FUNDS	1,000
WIKIMEDIA FOUNDATION INC 1 MONTGOMERY STREET - STE 1600 SAN FRANCISCO,CA 94104	NONE	501(c)	PROVIDE OPERATING FUNDS	6,000
VERMONT COMMUNITY FOUNDATION 3 COURT STREET MIDDLEBURY,VT 05753	NONE	501(c)	PROVIDE OPERATING FUNDS	2,000
VERMONT INT'L FILM FESTIVAL PO BOX 483 BURLINGTON,VT 05402	NONE	501(c)	PROVIDE OPERATING FUNDS	500
CHARITY NAVIGATOR 139 HARRISTOWN ROAD STE 101 GLEN ROCK,NJ 07452	NONE	501(c)	PROVIDE OPERATING FUNDS	250
GENERATOR INC 250 MAIN STREET BURLINGTON,VT 05401	NONE	501(c)	PROVIDE OPERATING FUNDS	105,000
SPECTRUM YOUTH FAMILY SVCS 31 ELMWOOD AVENUE BURLINGTON,VT 05401	NONE	501(c)	PROVIDE OPERATING FUNDS	5,100
VERMONT WOMEN'S FUND 3 COURT STREET MIDDLEBURY,VT 05753	NONE	501(c)	PROVIDE OPERATING FUNDS	2,000
UNITED WAY OF MASSACHUSETTS BAY 51 SLEEPER STREET BOSTON,MA 02210	NONE	501(c)	PROVIDE OPERATING FUNDS	2,500
PLANNED PARENTHOOD OF NO NEW ENGLAN 784 HERCULES DRIVE - STE 110 COLCHESTER,VT 05446	NONE	501(c)	PROVIDE OPERATING FUNDS	2,000
VERMONT ARTS COUNCIL 136 STATE STREET - STE 6001 MONTPELIER,VT 05633	NONE	501(c)	PROVIDE OPERATING FUNDS	2,500
VERMONT PUBLIC RADIO 365 TROY AVENUE COLCHESTER,VT 05446	NONE	501(c)	PROVIDE OPERATING FUNDS	3,000

ERMONT PBS 10 EAST ALLEN STREET - STE 202 WINOOSKI,VT 05404	NONE	501(c)	PROVIDE OPERATING FUNDS	1,000
OLIN COLLEGE 1000 OLIN WAY NEEDHAM,MA 02492	NONE	501(c)	PROVIDE OPERATING FUNDS	5,000
APPALACHIAN MOUNTAIN CLUB 5 JOY STREET BOSTON,MA 02108	NONE	501(c)	PROVIDE OPERATING FUNDS	7,000
VT DIGGER 26 STATE STREET - STE 8 MONTPELIER,VT 05602	NONE	501(c)	PROVIDE OPERATING FUNDS	2,000
EARTH JUSTICE 50 CALIFORNIA STREET STE 500 SAN FRANCISCO,CA 94111	NONE	501(c)	PROVIDE OPERATING FUNDS	6,250
STEVENSON SCHOOL 24 W 74TH STREET NEW YORK,NY 10023	NONE	501(c)	PROVIDE OPERATING FUNDS	1,000
3 DOORS 554 DRUMHELLER LANE SHIPMAN,VA 22971	NONE	501(C)	PROVIDE OPERATING FUNDS	4,000
INDIANA UNIVERSITY - O'NEIL SCHOOL PO500 BLOOMINGTON,IN 47402	NONE	501(C)	PROVIDE OPERATING FUNDS	1,500
INTERVALE CENTER 180 INTERVALE ROAD BURLINGTON,VT 05401	NONE	501(C)	PROVIDE OPERATING FUNDS	3,000
KENYON COLLEGE 103 COLLEGE ROAD GAMBIER,OH 43022	NONE	501(C)	PROVIDE OPERATING FUNDS	3,000
LEXINGTON COMMUNITY FARM 52 LOWELL STREET LEXINGTON,MA 02420	NONE	501(C)	PROVIDE OPERATING FUNDS	3,000
FEEDING CHITTENDEN 228 NORTH WINOOSKI AVENUE BURLINGTON,VT 05401	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
URBAN JUSTICE CENTER 40 RECTOR STREET NEW YORK,NY 10006	NONE	501(C)	PROVIDE OPERATING FUNDS	4,750
GREATER BURLINGTON YMCA 298 COLLEGE STREET BURLINGTON,VT 05401	NONE	501(C)	PROVIDE OPERATING FUNDS	3,100
AMERICAN WHITEWATER ASSOCIATION PO BOX 1540 CULLOWHEE,NC 28723	NONE	501(C)	PROVIDE OPERATING FUNDS	3,000
BOSTON HEALTHCARE FOR THE HOMELESS 780 ALBANY STREET BOSTON,MA 02118	NONE	501(C)	PROVIDE OPERATING FUNDS	2,500
LAUNCH VT 60 MAIN STREET BURLINGTON,VT 05401	NONE	501(C)	PROVIDE OPERATING FUNDS	7,000
ECHO LEAHY CENTER 1 COLLEGE STREET BURLINGTON,VT 05401	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
CENTER FOR WOMEN ENTERPRISE 44 SCHOOL STREET - STE 200 BOSTON,MA 02108	NONE	501(C)	PROVIDE OPERATING FUNDS	2,000
THE CURTIS FUND 3 COURT STREET MIDDLEBURY,VT 05753	NONE	501(C)	PROVIDE OPERATING FUNDS	4,000
NATURAL RESOURCES DEFENSE COUNCIL 40 WEST 20TH STREET 11TH FLOOR NEW YORK,NY 10011	NONE	501(C)	PROVIDE OPERATING FUNDS	3,000
UP FOR LEARNING 155 ELM STREET - STE 1 MONTPELIER,VT 05602	NONE	501(C)	PROVIDE OPERATING FUNDS	4,000
INDIANA UNIV - MAUER SCHOOL OF LAW PO BOX 500 BLOOMINGTON,IN 47402	NONE	501(C)	PROVIDE OPERATING FUNDS	2,500
PAWS 15305 44TH AVENUE W LYNNWOOD,WA 98087	NONE	501(C)	PROVIDE OPERATING FUNDS	500
THE JANET S MUNT FAMILY ROOM 20 ALLEN STREET BURLINGTON,VT 05401	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
ROOM TO GROW 400 SHAWMUT AVENUE BOSTON,MA 02118	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
PLANNED PARENTHOOD OF MASSACHUSETTS 1055 COMMONWEALTH AVENUE BOSTON,MA 02215	NONE	501(C)	PROVIDE OPERATING FUNDS	5,500

SARA HOLBROOK COMMUNITY CENTER 66 NORTH AVENUE BURLINGTON,VT 05401	NONE	501(C)	PROVIDE OPERATING FUNDS	5,000
ELECTRONIC FREEDOM FOUNDATION 815 EDDY STREET SAN FRANCISCO,CA 94109	NONE	501(c)	PROVIDE OPERATING FUNDS	1,000
SOCIAL GOOD FUND PO BOX 5473 RICHMOND,CA 94805	NONE	501(c)	PROVIDE OPERATING FUNDS	2,000
EAST OAKLAND COMMUNITY PROJECT 7515 INTERNATIONAL BLVD OAKLAND,CA 94621	NONE	501(c)	PROVIDE OPERATING FUNDS	5,250
FOLDS OF HONOR 5800 N PATRIOT DRIVE OWASSA,OK 74055	NONE	501(c)	PROVIDE OPERATING FUNDS	1,000
Total			▶ 3a	519,700
b <i>Approved for future payment</i>				
Total			▶ 3b	

Additional Data

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Software ID: 20011551

Software Version: 2020v4.0

Form 990PF - Special Condition Description:

Special Condition Description

TY 2020 IRS 990 e-File Render

Name: RUTH & PETER METZ FAMILY FOUNDATION
co THOMAS PHELAN

EIN: 52-1591150

Software ID: 20011551

Software Version: 2020v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Angelo & O'Brien, P.A.	5,530	5,530	0	0

TY 2020 IRS 990 e-File Render

Name: RUTH & PETER METZ FAMILY FOUNDATION

co THOMAS PHELAN

EIN: 52-1591150

Software ID: 20011551

Software Version: 2020v4.0

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Due from Broker	141,659	5,404	5,404

TY 2020 IRS 990 e-File Render

Name: RUTH & PETER METZ FAMILY FOUNDATION
co THOMAS PHELAN

EIN: 52-1591150

Software ID: 20011551

Software Version: 2020v4.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Foreign Taxes	3,795	3,795		
Investment Expenses	109,369	109,369		
Service Charges	91	91		
Trading Expenses	6,871	6,871		

TY 2020 IRS 990 e-File Render

Name: RUTH & PETER METZ FAMILY FOUNDATION
co THOMAS PHELAN

EIN: 52-1591150

Software ID: 20011551

Software Version: 2020v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Federal Income taxes	7,000			